

2015 Oregon Vineyard and Winery Census Report

September 2016

2015 saw increases in production for the Oregon wine industry.

- Pinot Noir continues to lead all varieties accounting for 62% of planted acreage and 67% of vineyard production.
- The number of vineyard operations increased by 2% to 1,052 leading to a 2% increase in planted acres from 2014
- Overall, vineyard yields were up, with the most significant increases in the South Willamette Valley and Umpqua Valley.
- The number of "all" wineries, including TTB-bonded and OLCC Grower Sales Privilege and Winery license holders, increased from 676 to 702.
- Total tons of grapes crushed increased 5% to 73,518 from 2014, with the North Willamette Valley accounting for 75% of total crush.
- Case sales increased 9% to 3.1 million in 2015, with the largest channel increase in direct to consumer sales (14%).
- Canada continues to be Oregon's largest export market, accounting for 44% of total exports.

Vineyard Section:

Table 1: Wine grapes: Acreage, yield, production, price and value, variety, 2014-2015¹

Variety	All Planted Acreage		Harvested Acreage		Yield per Harvested Acre		Production		Price per Ton ²		Value of Production ³	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Dollars</i>	<i>Dollars</i>	<i>1,000 Dollars</i>	<i>1,000 Dollars</i>
Cabernet Franc	170	162	148	139	3.37	2.79	501	389	2,225	2,267	1,114	883
Cabernet Sauvignon	606	630	567	596	2.78	2.47	1,575	1,472	2,399	2,608	3,778	3,839
Chardonnay	1,353	1,564	1,120	1,181	3.55	3.11	3,972	3,668	1,945	1,837	7,725	6,738
Gewüztraminer	237	213	216	198	2.66	2.99	576	591	1,356	1,267	781	749
Merlot	487	461	384	385	3.46	2.88	1,330	1,109	1,950	1,992	2,593	2,209
Müller Thurgau	110	92	89	85	4.86	5.11	431	434	1,073	1,133	463	492
Pinot Blanc	262	246	220	218	4.44	4.70	978	1,025	1,685	1,375	1,648	1,410
Pinot Gris	3,631	3,615	3,421	3,403	4.01	4.49	13,701	15,294	1,422	1,427	19,478	21,819
Pinot Noir	17,146	17,452	15,356	15,507	2.95	3.27	45,239	50,737	2,518	2,353	113,897	119,372
Riesling	754	724	685	666	3.20	3.71	2,194	2,470	1,017	1,179	2,232	2,912
Sauvignon Blanc	73	114	67	89	3.34	3.93	223	350	1,534	1,754	342	613
Syrah	665	620	574	554	3.41	2.87	1,960	1,593	2,345	2,261	4,596	3,600
Tempranillo	344	414	316	364	2.66	3.39	839	1,234	2,084	2,015	1,749	2,487
Viognier	257	241	230	222	3.34	3.09	768	688	1,839	1,810	1,412	1,245
Zinfandel	100	80	97	59	3.35	3.32	324	195	1,814	1,778	588	346
All Others	1,196	1,406	1,004	1,074	3.64	3.45	3,653	3,702	1,685	1,899	6,155	7,029
Total ⁴	27,390	28,034	24,494	24,742	3.20	3.43	78,264	84,949	2,136	2,001	168,552	175,745

¹ Includes estimates for incomplete responses.

² Price per ton is a weighted average of price received by Oregon grape growers.

³ Value of production is derived by multiplying quantity times price.

⁴ Totals may not add up due to rounding.

Table 2: Wine grapes: Vineyards, acreage, yield and production by growing area, 2014-2015¹

Growing Area	Number of Vineyards		All Planted Acreage		Harvested Acreage		Yield per Harvested Acre		Production	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
	<i>Number²</i>	<i>Number²</i>	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>
North Willamette Valley ³	591	606	16,545	16,993	15,158	15,143	3.36	3.51	50,977	53,089
South Willamette Valley ⁴	103	109	2,750	2,785	2,395	2,438	2.94	3.54	7,038	8,618
Umpqua Valley ⁵	70	69	2,660	2,688	2,408	2,443	2.12	3.62	5,102	8,837
Rogue Valley ⁶	156	164	3,226	3,313	2,650	2,856	3.27	3.23	8,667	9,220
Columbia River ⁷ and at large	107	104	2,209	2,254	1,883	1,862	3.44	2.79	6,480	5,185
Total ⁸	1,027	1,052	27,390	28,034	24,494	24,742	3.20	3.43	78,264	84,949

¹ Includes estimates for incomplete responses.

² Numbers fluctuate due to inconsistent responses.

³ Includes Yamhill-Carlton District, Chehalem Mountains, McMinnville, Ribbon Ridge, Dundee Hills, Eola-Amity Hills and areas north of Monmouth and the South Salem Hills.

⁴ Includes areas south of Monmouth and the South Salem Hills and all of Lane County.

⁵ Includes Elkton and Red Hills.

⁶ Includes Applegate Valley.

⁷ Includes Columbia Gorge, Columbia Valley, Walla Walla Valley, The Rocks, and Snake River Valley.

⁸ Totals may not add up due to rounding.

Table 3: Wine grapes: Acreage and production, by variety and area, 2014 and 2015 totals¹

Variety	North Willamette Valley ²			South Willamette Valley ²			Umpqua Valley ²			Rogue Valley ²			Columbia River ² and at large		
	Planted Acreage	Harvested Acreage	Production	Planted Acreage	Harvested Acreage	Production	Planted Acreage	Harvested Acreage	Production	Planted Acreage	Harvested Acreage	Production	Planted Acreage	Harvested Acreage	Production
	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>	<i>Acres</i>	<i>Acres</i>	<i>Tons</i>
Cabernet Franc	1	1	6	0.3	0.3	1	17	10	9	82	70	223	62	58	151
Cabernet Sauvignon	5	5	1	8	8	22	37	29	46	199	179	465	380	374	938
Chardonnay	1,135	871	2,742	147	105	277	12	12	22	233	162	567	37	32	60
Gewüztraminer	120	108	304	37	35	85	14	14	33	35	35	149	7	6	20
Merlot	2	2	4	1	1	2	79	64	131	192	152	582	187	166	390
Müller Thurgau	66	63	378	13	10	36	13	12	20	-	-	-	-	-	-
Pinot Blanc	200	182	891	21	12	32	5	5	17	21	20	86	-	-	-
Pinot Gris	1,974	1,835	8,827	489	471	2,505	320	303	1,481	474	439	1,198	358	355	1,283
Pinot Noir	12,504	11,219	36,526	1,913	1,666	5,306	1,640	1,555	5,936	944	777	2,267	450	290	702
Riesling	372	356	1,399	89	82	242	51	22	57	178	174	670	35	32	102
Sauvignon Blanc	50	47	214	3	3	4	19	5	17	37	30	103	5	4	13
Syrah	32	29	93	-	-	-	96	88	210	233	209	741	259	228	548
Tempranillo	31	22	98	3	2	4	158	139	413	160	145	575	61	55	144
Viognier	34	34	108	7	5	15	18	16	51	171	161	503	11	6	11
Zinfandel	-	-	-	-	-	-	4	4	7	52	50	186	23	4	1
All Others	468	368	1,498	53	36	87	206	165	389	302	253	906	377	252	821
Total, 2015³	16,993	15,143	53,089	2,785	2,438	8,618	2,688	2,443	8,837	3,313	2,856	9,220	2,254	1,862	5,185
Total, 2014 ³	16,545	15,158	50,977	2,750	2,395	7,038	2,660	2,408	5,102	3,226	2,650	8,667	2,209	1,883	6,480

¹ Includes estimates for incomplete responses.

² See Growing Area descriptions in Vineyard Section Table 2.

³ Totals may not add up due to rounding.

- No data to report.

Table 4: Wine grapes: Price per ton, by variety and region, 2015¹

Variety	Statewide ²				Regions ¹																			
					North Willamette Valley				South Willamette Valley				Umpqua Valley				Rogue Valley				Columbia River and at large			
	Average ³	Median ⁴	Low	High	Average ³	Median ⁴	Low	High	Average ³	Median ⁴	Low	High	Average ³	Median ⁴	Low	High	Average ³	Median ⁴	Low	High	Average ³	Median ⁴	Low	High
	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>	<i>Dollars</i>
Cabernet Franc	2,267	2,218	1,327	3,258	-	-	-	-	-	-	-	-	-	-	-	-	2,153	1,974	1,503	2,677	2,385	2,457	1,855	3,258
Cabernet Sauvignon	2,608	2,000	1,050	3,757	-	-	-	-	-	-	-	-	-	-	-	-	2,137	1,800	1,200	2,820	2,805	2,500	1,884	3,757
Chardonnay	1,837	2,000	1,000	3,750	2,039	2,235	1,462	3,750	1,369	1,422	1,000	1,687	-	-	-	-	1,667	1,648	1,300	2,168	-	-	-	-
Gewürztraminer	1,267	1,420	796	1,816	1,287	1,450	796	1,816	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Merlot	1,992	1,844	949	3,245	-	-	-	-	-	-	-	-	-	-	-	-	1,718	1,822	1,150	2,288	2,308	2,435	1,400	3,245
Müller Thurgau	1,133	1,094	999	2,107	1,067	1,100	999	1,382	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Pinot Blanc	1,375	1,425	726	2,300	1,312	1,508	726	2,300	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Pinot Gris	1,427	1,550	918	2,667	1,378	1,568	918	2,667	1,482	1,500	1,190	2,200	-	-	-	-	1,541	1,417	1,349	2,000	-	-	-	-
Pinot Noir	2,353	2,405	1,000	5,200	2,438	2,586	1,000	4,641	2,378	2,300	1,500	5,200	2,125	1,880	1,500	2,222	1,975	1,959	1,000	2,325	2,571	2,262	1,856	3,807
Riesling	1,179	1,400	900	3,234	1,074	1,538	900	2,857	1,752	1,400	1,000	2,320	-	-	-	-	1,192	1,300	950	1,710	-	-	-	-
Sauvignon Blanc	1,754	1,760	1,154	2,250	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Syrah	2,261	2,100	1,000	3,913	-	-	-	-	-	-	-	-	-	-	-	-	2,169	2,075	1,000	2,500	2,465	2,357	1,675	3,913
Tempranillo	2,015	1,993	1,000	3,489	2,094	1,974	1,496	3,489	-	-	-	-	-	-	-	-	1,983	2,200	1,091	2,500	-	-	-	-
Viognier	1,810	1,874	1,000	2,712	1,588	1,573	1,394	1,880	-	-	-	-	-	-	-	-	1,922	1,900	1,547	2,200	-	-	-	-
Zinfandel	1,778	1,815	1,207	2,090	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
All Others	1,899	1,854	496	5,629	1,373	1,573	496	3,000	1,352	1,399	1,000	1,820	1,772	1,755	500	2,500	1,923	2,000	950	3,200	2,612	3,000	1,794	5,629
Total²	2,001	2,044			2,006	2,182			1,944	1,905			2,075	1,862			1,863	1,832			2,581	2,562		

¹ See Growing Area descriptions in Vineyard Section Table 2.

² Statewide prices include data from all regions including those with insufficient data to report separately.

³ Averages are a weighted average of prices received by Oregon grape growers.

- Insufficient data available to report at the regional level.

Winery Section:

Table 1: Wineries: Number, crush and cooerage, by growing region, Oregon, 2014-2015¹

Growing Region ²	All Wineries ³		Total ⁵ Wine Grapes Crushed	
	2014	2015	2014	2015
	<i>Number⁴</i>	<i>Number⁴</i>	<i>Tons</i>	<i>Tons</i>
North Willamette Valley	440	468	50,511	55,328
South Willamette Valley	67	63	3,079	3,022
Umpqua Valley	41	40	1,848	2,812
Rogue Valley	80	84	6,767	5,378
Columbia River and at large	48	47	7,908	6,978
Total⁵	676	702	70,112	73,518

¹ Includes estimates for incomplete responses.

² Survey respondents identified one of these growing regions as their production location. See Growing Area descriptions in Vineyard Section Table 2.

³ Includes all TTB bonded wineries and Growers Sales Privilege and Winery License holders (issued by the OLCC).

⁴ Numbers fluctuate due to inconsistent responses.

⁵ Totals may not add up due to rounding.

Table 2: Wineries: Crush, by grape source location and crush area, 2014 and 2015 totals¹

Growing Region ²	Sourced in Oregon	Sourced from Other States	All Crush, 2015	All Crush, 2014
	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>	<i>Tons</i>
North Willamette Valley	54,567	761	55,328	50,511
South Willamette Valley	3,005	17	3,022	3,079
Umpqua Valley	2,812	-	2,812	1,848
Rogue Valley	5,377	1	5,378	6,767
Columbia River and at large	6,088	891	6,978	7,908
Total, 2015³	71,849	1,670	73,518	
Total, 2014 ³	67,675	2,437		70,112

¹ Includes estimates for incomplete responses.

² Survey respondents identified one of these growing regions as their production location. See Growing Area descriptions in Vineyard Section Table 2.

³ Totals may not add up due to rounding.

Table 3: Wineries: Sales by sales channel, 2014-2015¹

Year	Direct to Consumer			Wholesale (FOB, Trade, etc.)				Total Cases ⁴	Total Dollars ⁴
	Tasting Rooms	Wine Clubs	Web/Phone Orders	Sold in Oregon	Sold Nationally (excluding Oregon)	Sold Internationally	Private Label		
	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>			
2015	421,178	232,045	81,568	574,232	1,645,668	70,608 ²	68,361	3,093,661	470,650,919
2014	386,126	186,441	72,954	570,994	1,555,686	62,241 ³	NA	2,834,442	430,417,579

¹ Includes estimates for incomplete responses except international sales.

² Includes historical data for incomplete responses.

³ Correction to 2014. Previous data on 2014 exports were not disaggregated by destination and included estimates. In order to make 2014 comparable to 2015, the data were disaggregated by destination and estimates were removed.

⁴ Totals may not add up due to rounding.

Table 4: Wineries: Export sales, by destination, Oregon, 2015 totals¹

Canada	Mexico	Denmark	United Kingdom	Sweden	All Other Europe	Hong Kong /China	Japan	South Korea	All Other Asia	All Other Destinations	All Export Sales
<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>	<i>Cases</i>
31,015	923	2,446	6,853	2,752	2,301	2,784	11,466	1,014	700	7,813	70,068

¹ Includes estimates from historical data for incomplete responses.